

Capital Campaign Feasibility Study
Dublin Performing Arts Center

Proposal Prepared For:



Prepared By:



Benefactor Group
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Our Understanding

Benefactor Group is pleased to submit our proposal for a capital campaign feasibility study. The City of Dublin and its partners Ohio University, Crawford Hoving Development, and the Dublin Arts Council are in the beginning stages of an exciting new development as part of the City's Bridge Street District (collectively: Dublin Performing Arts Center, DPAC). Ensuring the project's success begins with a thorough understanding of the community's perception and potential support. Through this study, Benefactor Group will evaluate the core aspects of successful fundraising.

- **Highly regarded project partners** that have earned the respect of the audience and the community at large for exceptional performances and prudent administration.
- A **compelling case for support** that describes fundraising goals as sound philanthropic investments that will appeal to prospective donors.
- Generous **leadership gifts** that account for 60% or more of the goal and inspire generosity from others.
- Committed **leaders** who will devote their time and talent to achieve the fundraising results.
- Ample **philanthropic potential** within your prospect pool.
- Sufficient **technology, infrastructure, and personnel** within the organization to carry out the appropriate fundraising tactics.

The philanthropic landscape is strong. While many organizations are launching or have campaigns underway, we are bullish on the ability of organizations with compelling plans and strong leadership to meet their fundraising goals.

Benefactor Group will evaluate the strength of these factors, take into consideration the current philanthropic landscape as described above, and, based on what we learn, we will recommend strategies that will guide you in meeting your philanthropic goals.

About Benefactor Group

Established in 1999, Benefactor Group has won a reputation for innovative consulting and management services that build the capacity of nonprofit organizations; develop staff and volunteer leadership; and plan for and support capital, endowment, and comprehensive campaigns. In just the past few years, Benefactor Group has designed and implemented dozens of fundraising studies with organizations of all sizes and complexity in arts and culture, education, health and human services, conservation, civic affairs, and faith communities.

Our staff of twelve professionals includes members of the Association of Fundraising Professionals (AFP), Partnership for Philanthropic Planning, *Giving USA* Editorial Review Board, Society for Human Resource Management, Alliance for Nonprofit Management, American Alliance of Museums, and the Nonprofit Technology Network. Our staff includes award winners, national thought leaders, and published authors.

We serve clients at home and around the world, and our access to human resources, research and reference materials, technology, and professional networks is tailored to meet each client's particular needs. We strive to nurture mutually rewarding relationships, **serving those who serve the common good®**.

Why we're right for the Dublin Performing Arts Center

We are uniquely suited to help the leaders of DPAC prepare for and implement a fundraising campaign.

At Benefactor Group, **our size is our strength**. Our boutique firm of twelve people gives each client the one-on-one support that they require. We have the capacity to put our firm's principals at the helm of your planning process while also engaging senior consultants to guide it.

We understand and celebrate the culture and values of DPAC. In the same way that DPAC seeks to inspire Dublin residents and visitors through exposure to the arts, we are equally committed to creating exceptional experiences with clients.

Serving the arts and culture community is a passion for Benefactor Group. We work with arts organizations across the country and in Central Ohio. A small sample of local arts clients include:



We've also served theatres, performing arts organizations, and museums across the country, such as the Victoria Theatre Association (Dayton), the Aspen Music Festival and School (Colorado), Norman Rockwell Museum (Massachusetts) and the Virginia Museum of Fine Arts.

We understand start-up campaigns. When civic leaders in Findlay, Ohio considered transforming a vacant downtown high school, Benefactor Group worked with them to help create the new Marathon Center for the Performing Arts. We supported committed volunteers in Bentonville, Arkansas as they realized their vision of a vibrant children's museum, the AMAZEUM.

We are active members of the Central Ohio philanthropic community. Beginning next year, one of our own, Cathy Fynes, will become the President of the Central Ohio Chapter of the Association of Fundraising Professionals.

Benefactor Group is a member of *The Giving Institute*, a select consortium of the nation's premiere fundraising firms who adhere to the highest performance and ethical standards. We contribute to the field through our work with *Giving USA*, the most authoritative report on giving in America, researched by the Lilly Family School of Philanthropy at Indiana University. Laura MacDonald, our President, co-edited the 2016 report and three members of our firm served as subject-matter experts for sections of the report.

Benefactor Group builds strong relationships through meaningful and frequent communication, and by providing clients with the tools and skills to succeed. We believe in creating a culture of inspired philanthropy, developing a broad base of support, as well as developing board leadership and fundraising competencies. It would be a pleasure to work with you.

Our diverse experiences as fundraisers, executive-level staff, accomplished writers, strategists, technologists, and thought leaders in the field of philanthropy give us the depth of knowledge required to guide you through this transformational project. Our work with similar organizations informs both our process and our method, tailored to DPAC's needs. Each member of our team is a specialist, and the entire team brings its collective insight to bear on recommendations and planning with clients like you.

Project Approach

Orientation and Initiation

Kickoff

To begin the project, Benefactor Group will work with DPAC on the following tasks.

- Request a variety of documents including gift policies, fundraising and marketing materials, annual reports, and other relevant information
- Become well acquainted with the envisioned programs and activities of DPAC
- Facilitate an orientation and kickoff meeting

Our objective is to become thoroughly familiar with DPAC's plans, while determining the infrastructure and the resources needed to implement successful campaign fundraising practices.

Task Force

The study Task Force consists of small number of members (no more than eight) that represent the key project stakeholders. During the study, the Task Force will be asked to convene three times and to provide advice and insight. The involvement of these leaders will help ensure the study process stays on course, will bolster credibility and ownership of the final product, and may facilitate eventual fundraising.

At the first meeting, Task Force members will do the following.

- Affirm the project timeline
- Affirm the preliminary case for support
- Review and refine the list of names of those who will be invited to participate in an interview during the study
- May be asked to assist in securing key appointments as necessary

The Task Force will come together a second time, most likely by conference call or by other electronic means, to receive a project update.

After the final study report has been drafted and reviewed internally by leaders, the Task Force will be asked to gather for the third and final time to respond to the report and the findings and recommendations before it goes to the project partners.

Preliminary Case for Support

A crucial aspect of the initial phase will be to create a preliminary case for support. Benefactor Group will work with DPAC to develop a two- to three-page document that provides a powerful and succinct articulation of the campaign goals. DPAC will review a draft of the document and provide feedback to Benefactor Group, who will make two revisions to the document. It will be shared with the Task Force during the initial meeting.

The preliminary case for support offers compelling arguments for completing the campaign vision with a sense of urgency. It will serve as the basis of conversation between Benefactor Group consultants and DPAC supporters during the confidential interviews described below.

Identify Study Participants

Individual Interviews

Benefactor Group will work with DPAC to identify approximately 40 potential candidates who would be important to interview during the feasibility study. The Task Force will review and refine the list. We would like to speak with past, current, and potential donors whose involvement in this study can make the campaign successful. To that end, we will seek approximately 30 interviews.

Focus Groups (Optional)

Hosting focus groups is an excellent way to engage more individuals in the process without the time and expense associated with individual interviews. Benefactor Group could facilitate one to three focus groups to learn the perspectives of a broad base of supporters. Each group will consist of eight to 12 supporters and be designed to give an overview of proposed campaign objectives. Among other outcomes, the sessions will include the following benefits.

- Elicit participants' reactions to campaign goals
- Rank campaign priorities in order of importance
- Determine if participants would support fundraising activities with personal gifts and/or peer-to-peer solicitations

Online Survey (Optional)

You may wish to consider an online survey for individuals who are not interviewed or did not participate in a focus group discussion. We will work with DPAC staff to determine potential participants in the survey. We will create the survey to administer to the individuals selected to receive the survey. All the responses will come directly to Benefactor Group to ensure anonymity for computation and analysis.

The combination of one-on-one interviews, facilitated large-group discussions, and online survey will provide a breadth of insights that inform and empower our fundraising recommendations and strategies going forward.

Discovery

Internal Readiness Assessment

To determine DPAC'S readiness for a campaign, Benefactor Group will review any existing systems, processes and policies, and staffing structure. We will also explore your planned governance structure to determine the role of volunteer leadership. The assessment may include the following tasks.

- Meet with the project partners to assess the office structure needs and review organizational plans.
- Review job functions, reporting relationships, performance plans and metrics, and goals.
- Review documents, including materials used in fundraising efforts, grant applications, donor records, and any other relevant information.
- Review data management to ensure a system that will support tracking, reporting, and analysis.

This process of gathering information and attentive listening provides us with the insights to assess staff configuration and capacity to meet the demands of a campaign.

Conduct Interviews

Benefactor Group will conduct approximately 30 confidential interviews. Each prospective interviewee will receive the preliminary case for support and a letter of invitation to participate in the feasibility study.

We will prepare an invitation letter and ask you to invite prospective participants to take part in the study. This allows interviewees to be prepared for a productive conversation. DPAC will contact prospective interviewees to schedule a 45- to 60-minute meeting. We attempt to conduct interviews in person; however, we may need to conduct telephone interviews when schedules preclude personal meetings.

Through these discussions we will accomplish the following.

- Assess the philanthropic appeal of the proposed fundraising goals among potential donors.
- Evaluate the likelihood of attracting strong leaders and leadership gifts to support a campaign.
- Identify external factors such as philanthropic competition and the general economic climate that may affect the timing and strategy of a fundraising effort.

We will also create a Table of Gifts to share with study participants to gauge their level of engagement. Each participant will be asked to identify the best candidates for leadership gifts and volunteer leadership and to assess their own intent to participate in a potential campaign as a donor and/or volunteer. All comments will be held in confidence.

Focus Group Discussions and Online Survey (Optional)

While the personal interviews are being conducted, Benefactor Group will work with DPAC to organize and schedule the focus group discussions and administer the survey to the selected cohort. We will prepare a letter of invitation, develop the questionnaire for distribution at the conclusion of the focus group discussions, and design the survey. All data collected from the discussions and online survey will come directly to Benefactor Group and be held in confidence.

Analysis, Report Preparation, and Presentation

Once all interviews, focus group discussions, and the online survey have been completed, Benefactor Group consultants will analyze the data gathered during discovery.

Analysis

We gather quantitative information—data, statistics, and responses to yes-no and multiple-choice questions on our questionnaire. We also collect qualitative information—stories, anecdotes, and the answers to open-ended questions from the interviews. We enter the quantitative data into a common source that allows us to collate and cross tabulate the information. We will also add the qualitative information from our interviews, discussions, and survey and perform text analysis of this information.

Skull Session

Benefactor Group brings our team to every project, even those that are not on the project team – at no additional cost to our clients. Our consulting team and colleagues review and interpret all the data, bringing their individual perspectives and experience to the analysis. We also compare the information we've gathered to industry standards and best practices. In light of the data, we look closely at your mission and fundraising goals and as a team we formulate our recommendations. While we are applying a variety of analytic techniques, our analysis goes well beyond “number crunching” to give you the benefit of our experienced judgment and collective expertise.

Report

Our final deliverable is a comprehensive report of findings and recommendations that includes the following.

- **Executive Summary**—a concise synopsis of the report
- **Method**—documentation of the study process, including the timeframe, tasks accomplished, and the individuals we engaged on your behalf
- **Findings**—analysis of the data we gathered to assess the likelihood of a successful campaign, interpretation of the interviews to evaluate support for your fundraising objectives, and potential leadership and leadership giving for a campaign; we will include selected quotes, without attribution, that represent comments made during the discovery interviews
- **Recommendations**—our advice, based on the findings, and our suggested strategies for such elements as campaign leadership recruitment, timing, fundraising goal, staffing and infrastructure, and the resources needed to guide and manage a campaign.

In a separate document, we will provide the names of those who were recommended as candidates for leadership gifts. We will also list the suggested volunteer leaders in order to help DPAC identify a campaign chair or co-chairs and volunteers who will fulfill campaign responsibilities.

Presentation

Benefactor Group will present findings and recommendations in three stages.

First, we will present a preliminary report to the project partners and the Task Force. This initial preview of the report may take up to two hours. It will allow your leadership team to delve into the findings, ask questions, and make comments about the recommendations.

The primary objectives of this preview process include the following.

- Empower your leaders with facts and findings that substantiate the recommendations.
- Allow for minor modifications or edits to the preliminary document.
- Promote leadership buy-in to the campaign strategy.

Second, we present the final report to the project partners. We typically make this a summary of the findings and recommendations as a PowerPoint presentation lasting up to one hour.

Finally, we will provide paper copies of the comprehensive final report as well as an electronic version.

Coaching, Support and Oversight

Next to listening, coaching is the most important thing we do. We haven't done our job until your team is prepared to do theirs – today, and for the future.

Throughout the process, Benefactor Group will devote time to coach and advise DPAC. In addition to coordinating recurring project status meetings with the project partners to provide planned, proactive communication, we will also ensure time for unplanned, open-ended strategy discussions reacting to current situations.

Representative Clients

BalletMet Columbus

BalletMet is an acclaimed dance company and home to one of the largest schools of dance in the Midwest. In planning for the future, BalletMet leaders crafted a bold strategy to purchase a facility and transform it into a dynamic dance center that could accommodate rehearsals for the professional company, classes for more than 1,000 dance students, a "black box" theatre for informal performances, and administrative offices. Benefactor Group conducted a community-wide campaign study, which affirmed BalletMet's capacity to raise more than \$6 million. Subsequently, Benefactor guided them through every phase of the capital campaign, which secured more than \$6.2 million in gifts, and helped the company achieve financial stability.

Since that campaign, BalletMet has engaged Benefactor Group to conduct another community-wide campaign planning study to assess their capacity to raise \$10 million for artistry and innovations and capital projects. Benefactor Group is currently guiding BalletMet through the preparation phase of a campaign.

Lisa G. Perks
Director of Development
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lperks@balletmet.org

Marathon Center for the Performing Arts

With the closing of a school in the heart of downtown Findlay, Ohio, the community's largest performance space was facing the wrecking ball. The leadership of the local community foundation and arts organizations engaged Benefactor Group to examine the feasibility of raising funds necessary to renovate the school auditorium and create a community performing arts center. When the study was completed, the firm was engaged further to establish a new 501(c)(3) organization, manage recruitment of volunteer leadership and a founding board of directors, search for initial staff, and launch a capital/endowment fundraising campaign totaling \$15 million.

Sources of funding for this project include a mixture of individual gifts (60%), support from corporations/companies (33%), government grants (5%), and foundations (2%).

Katherine Kreuchauf, President
The Findlay-Hancock County Community Foundation
419-425-1100
kkreuchauf@community-foundation.com

Victoria Theatre Association

The Victoria Theatre Association (VTA) is in the final stages of an endowment campaign to strengthen its long-term stability and, because of its success, was featured on the front page of the *Chronicle of Philanthropy* in December 2015.

VTA has helped sustain the vitality of downtown Dayton, Ohio, despite the departure of several of the region's major employers. As the owner and operator of the city's premier performing arts facilities—the Schuster Performing Arts Center, the historic Victoria Theatre, and the Metropolitan Arts Center—VTA recognized a responsibility to maintain the facilities for the benefit of future generations. Benefactor Group was retained to conduct a feasibility study and provide campaign consulting as the organization raises funds to double the endowment, update technology, and fund major deferred maintenance. Even though the community faces daunting challenges, philanthropic leaders have embraced the role of the arts in the region's quality of life and in economic and workforce development.

Ken Neufeld
President & CEO
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Greater Columbus Arts Council

The Greater Columbus Arts Council (GCAC) set out to demonstrate the importance of endowment funding for the arts and to encourage donors to create and/or strengthen endowments held by arts organizations and community foundations. GCAC retained Benefactor Group to conduct benchmarking research—comparing Columbus with six other cities—and to develop a compelling case for building stronger arts endowments. The study was used to strengthen endowment-building strategies among local arts organizations.

Tom Katzenmeyer
President
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Project Team

Laura MacDonald, President

Laura is a certified fundraising executive with more than 25 years' experience in nonprofit leadership, fundraising, and philanthropy. She has served as the vice president and creative director of a national fundraising firm and chief development officer in arts and higher education.

In 1999, she established a consulting firm to serve the needs of those who serve the common good®. Benefactor Group is currently working with arts, culture, and educational institutions; human service organizations; women's funds; and others working to improve the quality of life. In the summer of 2015 the firm celebrated the opening of new arts facilities where Laura and her team served as counsel: the expanded Columbus Museum of Art, the COSI Planetarium, and the grand openings of the Marathon Center for the Performing Arts in Ohio and the AMAZEUM, which is adjacent to the Crystal Bridges Museum in Bentonville, Arkansas.

The firm she established has served hundreds of clients, ranging from big ten universities and global NGOs to start-up community organizations. Laura has helped clients achieve unprecedented successes: the largest contribution ever to an arts organization in central Ohio; engaging board retreats for a national conservation organization; consistent increases in annual fund revenue for a women's fund; an innovative digital giving strategy for a social justice organization; a reinvigorated board for a literary society. Earlier in her career, she worked on campaigns for performing arts centers in Honolulu, HI and Birmingham and Mobile, AL.

Prior to establishing Benefactor Group, Laura was chief development officer at The Ohio State University's Wexner Center for the Arts where she helped the organization secure its largest-ever corporate sponsorship and foundation grant and highest membership. During her tenure, she also served as a senior development officer in the University's \$1.2 billion capital campaign.

She is a frequent speaker at local, regional, and national conferences. For many years she served on the Development and Membership Executive Committee of the American Alliance of Museums. She chairs the editorial review board for *Giving USA: The Annual Report on Philanthropy*, the seminal publication reporting on the sources and uses of charitable giving in the United States. Laura is frequently sought for her expertise, and has been quoted recently in the *Wall Street Journal*, *CNN Money*, *Sophisticated Giving*, and other local and regional publications.

Diana Newman, Executive Vice President

Diana's expertise includes strategic planning, evaluation and assessment, board development, public speaking, group facilitation, fundraising services for nonprofit organizations, and gift planning and endowment building.

She has nearly 30 years of nonprofit and philanthropic experience, most recently as the founder and principal of Philanthropic Resource Group for 14 years. Previously, she served as Vice President for Development for the Columbus Foundation and as the first Executive Director of the Ohio Historical Foundation.

Diana is the author of *Nonprofit Essentials: Endowment Building*, published by John Wiley & Sons in 2005; and *Opening Doors: Pathways to Diverse Donors*, published by Jossey-Bass in 2002 and the winner of the 2003 AFP/Skystone Ryan Prize for Research. She also wrote the curriculum and is a faculty member for the Community Foundations Fundamentals course, sponsored by the Council on Foundations.

Diana is the co-founder of the original *Leave A Legacy* program in Columbus, a community-wide collaboration to encourage people from all walks of life to leave gifts to the charities of their choice. *Leave A Legacy* is now a national program sponsored by the National Committee on Planned Giving in more than 100 communities in the U.S and Canada.

The Central Ohio Chapter of the Association of Fundraising Professionals chose Diana as its 2004 Outstanding Fundraising Professional. Her volunteer activities include the Board of Trustees of the Partnership for Philanthropic Planning, president of the Central Ohio Planned Giving Council, and member of the International Association of Fundraising Professionals' Research Council.

Catherine Fynes

Cathy joined Benefactor Group in 2008 bringing with her nearly 25 years of experience in not-for-profit professional and volunteer management, fundraising, marketing, and media relations.

Since joining Benefactor Group, she has provided counsel to capital campaigns; conducted feasibility (campaign) studies; co-facilitated strategic planning/governance workshops; conducted development assessments and created fundraising plans; has provided assistance with executive recruitment; and has served as interim vice president of development for several not-for-profit organizations in the Columbus area.

She is the recipient of numerous citations and awards for her work on behalf of youth and for the development of signature special events and publications. She has served on several not-for-profit boards and committees both as a professional and as a community volunteer, including past president of the Northwest Ohio Chapter of the Association of Fundraising Professionals (AFP) and Leadership Toledo.

A member of the Central Ohio Chapter of AFP, Catherine serves as chair of the Mentoring Committee and will assume the role of President in 2017.

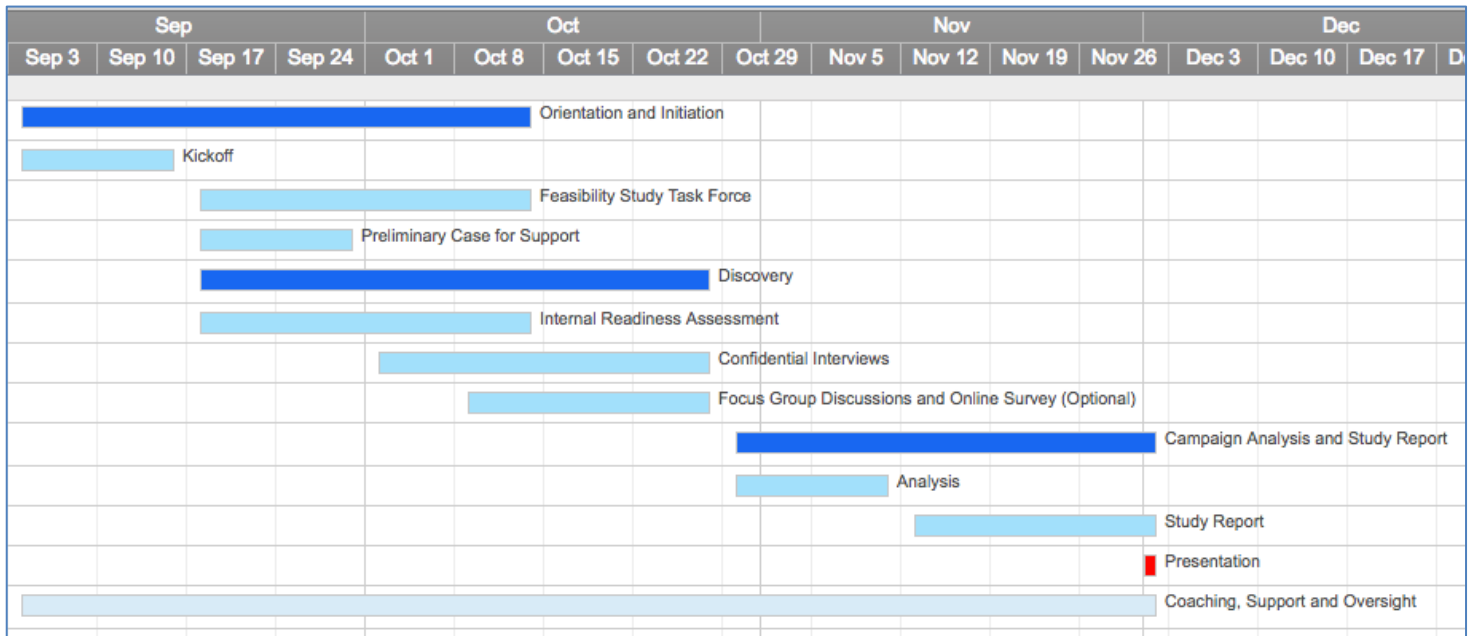
Ann Bryson, Consultant/Writer

Ann brings more than 25 years of leadership experience in the philanthropic field both as a grantmaker and a development professional. Ann has held senior roles at the Columbus Foundation, Nationwide Children's Hospital Foundation, and the OhioHealth Foundation. She served as Vice President of Program at the Columbus Foundation, where she managed the Foundation's discretionary grantmaking portfolio; provided counsel on mission and grantmaking strategy to numerous supporting foundations; served as chief program officer in Education; and worked with advised fund donors to help them fulfill their philanthropic visions.

As Vice President of Corporate and Foundation Relations at Nationwide Children's, Ann supported the fundraising to establish the Center for Family Safety and Healing and the Columbus Blue Jackets Family Resource Center. Her work at the OhioHealth Foundation included leading the successful capital campaign to build a new and expanded Kobacker House, the community's largest nonprofit freestanding inpatient hospice residence. Her extensive fundraising experience includes capital campaign planning and management; major gift solicitation; annual appeals; event sponsorships; and philanthropic communications and marketing. Ann has participated in campaign feasibility studies and has led groups of fundraising volunteers, including the OhioHealth Hospice Development Board and the Nationwide Children's Hospital Development Board. She is a member of the Board of Trustees of Shadowbox Live Theatre and has previously served on numerous nonprofit boards.

Timeline

The feasibility study will take approximately 12 to 14 weeks to complete. This timeframe begins when the letter of agreement for services is received, and may be adjusted up or down, depending on the availability of interview participants and other circumstances that improve or impede our progress.



Fee

Deliverable/Task	Fee
Orientation and Initiation	\$6,400
<i>Kickoff</i>	<i>\$1,600</i>
<i>Feasibility Study Task Force</i>	<i>\$1,600</i>
<i>Preliminary Case for Support</i>	<i>\$3,200</i>
Discovery	\$18,000
<i>Internal Readiness Assessment</i>	<i>\$2,000</i>
<i>Confidential Interviews</i>	<i>\$16,000</i>
<i>Focus Group Discussions and Online Survey</i>	<i>Optional</i>
Campaign Analysis and Study Report	\$11,200
<i>Analysis</i>	<i>\$4,000</i>
<i>Study Report</i>	<i>\$6,400</i>
<i>Presentation</i>	<i>\$800</i>
Coaching, Support, and Oversight	\$1,200
Total	\$36,800

The fee for the study is \$36,800. This fee is based on the scope as defined above. Should the scope change, additional fees may be incurred. In addition, each invoice will include an administrative fee equaling 2% of the consulting fee, covering standard administrative expenses such as printing, meeting services, supplies, and travel within Franklin County.

If DPAC chooses to include two focus groups, the additional fee will be \$2,700. The fee for the online survey will be \$1,500.